

Approvals & Public Reports

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Report Approvals

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One of the process management features of Yellowfin is the option of setting up report approval processes. This means that if a user wishes to publish a report to a public directory and they are not authorised to do so the report can be routed to an approver for approval prior to going live.

To enable the approval you must set the policy on every report category that you want it applied to.

See [Content Categories](#) for more information.

The approval process will determine if the user who wishes to save the report has the publish rights for that folder. If not, Yellowfin will determine an expert from the category and send that report for approval to the approver's inbox. Once approved, the report will be available to all users that have appropriate security access.

See [Report Approval](#) for more information.

Public Report Writers

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Yellowfin allows you to designate users that are permitted to publish Public Reports. Public reports are reports which are shared by all users with access.

Why designate Public Report Writers?

To maintain the integrity of your Public report repository it is advised to limit the number of users that can publish Public reports. These users will usually be the experts in the subject domain. These users will be able to verify that the data displayed in the reports is correct and therefore ensure that only validated reports are accessed by your report consumers.

How to designate users for Public publishing?

To be designated as a Public report writer your user must have:

1. Functional access to the capability – i.e. their role must permit them to be able to publish Public reports.
2. They must be able to save reports as Public reports in the specified report folders that they have access to. This means that either the report category:
 - a. allows all users with functional access to publish Public reports or
 - b. only permits users specified as experts can publish Public reports to the category.

Note: This option is used if you wish to restrict users from publishing Public reports in a specified category.

To restrict Public publish access either select a person or a group as the expert.

See [Roles](#) for more information.

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